

CP Cal Celebration XIV

Building the Collaborative Bridge



April 26, 27, & 28, 2019

Hilton Resort & Spa

Mission Bay, San Diego, California

CP CAL CELEBRATION XIV

CONFERENCE AT-A-GLANCE

Friday, April 26

- 8:00am–9:00am Registration
9:00am–4:15pm Pre-Conference Institutes (6 hours):
PCI #1 Richardson/Hill/Hughes/Martinez: Enrolling Folks into Collaborative Practice
PCI #2 Mosten: Building a Successful Collaborative Practice
12:00pm–12:45pm Lunch
4:15pm–5:45pm Delegates Reception/Meeting
5:45pm–7:30pm Celebration XIV Reception (No Host)
7:30pm–10:00pm Dine Around

Saturday, April 27

- 6:30am–7:30am Yoga
7:45am–8:45am Continental Breakfast and Report from the CP Cal Board of Directors
8:45am–12:00pm Single Workshop (3 hours):
#1 Ellison: Powerful Non-Defensive Communication: Cutting Edge Skills for Defusing Defensiveness, Often Instantly
8:45am–10:15am Concurrent Workshops (1 1/2 hours):
#2 Jacobson/Hunt/Kramer/McGaughey: It's Been 50 Years of No Fault: Really? Managing Client Expectations When They are Not Acknowledged by California Law
#3 Furze/Campbell/Denker/Flournoy/Proudfoot: Building Teamwork, Building Cases: How a "Study Group" Can Make All the Difference
#4 Weber/Hill/Ross: The Collaborative Case From Hell
10:30am–12:00pm Concurrent Workshops (1 1/2 hours):
#5 Wallis: Discovering Gaps in Client Processes and Using Technology to Improve Your Client's Experience
#6 Ahrons/Mosten: Co-Mediation: The Lawyer/Coach Team
#7 Sacks/Maloney/Walton: Best Practices for Support Agreements Considering Clients' Emotions
12:00pm–1:45pm Luncheon and Plenary I with Ellie Izzo & Vicki Carpel Miller: Exploring & Expanding Emotional intelligence: Enriching Clients and Professionals Along the Divorce Path Through the SeatBeat Experience
1:45pm–5:00pm Single Workshop (3 hours):
#8 Izzo/Miller: Exploring & Expanding Emotional intelligence: Enriching Clients and Professionals Along the Divorce Path Through the SeatBeat Experience
#9 Weber/Skillin: Starting with the Big Rocks: Preparing Parties for Settlement by Identifying Common High Level Shared Values and Goals

Saturday continued...

- 1:45pm–3:15pm Concurrent Workshops (1 1/2 hours):
#10 Murray: Vetting the House in Elder/Divorce Collaborative Law: Preventing Legal and Financial Problems with Real Property Taxation, Valuation, Disposition, and Division
#11 Ross/Crowley: Divorce Mortgage Financing - 2nd Installment
3:30pm–5pm Concurrent Workshops (1 1/2 hours):
#12 Clark/Daigle: Assessing Collaborative Suitability: Challenging Individual and Couple Characteristics
#13 Proudfoot: What Children Show About Divorce: Using the Sand Tray as a Child Specialist
6:00pm–11:30pm Dinner, Eureka Awards, Music and Dancing

Sunday, April 28

- 6:45am–7:45am Group Walk
8:00am–9:30am Breakfast and Plenary II with Sharon Strand Ellison
Powerful Non-Defensive Communication: Cutting Edge Skills for Defusing Defensiveness, Often Instantly
9:30am–12:45pm Single Workshop (3 hours):
#14 Hughes/Carey/Collinsworth: Agreement Readiness: How Full Interdisciplinary Teams Bring Clients to Agreement Readiness
#15 Buscho: Nesting For Happier Children: A New Approach to Preserving the Family and Putting Children First During Divorce
9:30am–11:00am Concurrent Workshops (1 1/2 hours):
#16 Skillin/Weber: The Caucus Genie: It Really is Magic!
#17 Laird/Hinds/Jones/Waldman: Who Wants the House? Quelling Family Drama in Probate/Post-Mortem Trust & Estates Matters
11:15am–12:45pm Concurrent Workshops (1 1/2 hours):
#18 Ross/Daigle/Nobler: Creative Storytelling: Enlisting, Engaging and Enrolling Clients in the Collaborative Process

CONFERENCE CO-CHAIRS

Meredith G. Lewis, JD, Co-Chair 2019 • Shawn Skillin, JD, Co-Chair 2019

PROGRAM COMMITTEE

Hal Bartholomew, JD, CFLS
Cathy Daigle, CFP®, CDFA®
Gary LaMusga, CDFA®
Diana Martinez, JD
Neil Penn, MFT
George Richardson, JD
Dawn Strachan, CDFA®
Lynn Waldman, LCSW

Questions? Contact:

Christine Maderos • 925-566-8590 • christine@cpcal.com

BUILDING THE COLLABORATIVE BRIDGE

PRE-CONFERENCE INSTITUTES

Friday, April 26, 2019 • 9:00am - 4:15pm • Hilton San Diego Resort & Spa
Registration for Pre-Conference Institutes is in addition to registration for the Conference. See Registration Form.

PCI #1 – Enrolling Folks into Collaborative Practice

George Richardson, Mark Hill, Carol Hughes, Diana Martinez

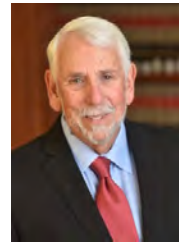


Informed decisions are a key focus in the collaborative process and can mean the difference between not only getting more collaborative cases, but also completing them successfully. How effectively are you enrolling potential participants at intake or, once enrolled, designing strategies with your client about conveying information to your client's spouse? Together, we will analyze presentation tools that have proven effective for leaders in the collaborative field. Presentation includes didactic and experiential teaching.

PCI #2 – Building a Successful Collaborative Practice

Woody Mosten

In 2018, the ABA Family Law Section released a book written by over 20 Collaborative Professionals how to build a successful practice. This PCI will be conducted by the lead author of this book and feature leading practice building strategies featured in this book. With interactive discussion about how to implement these tips to benefit your clients and grow your practice.



Friday, April 26, 2019

CELEBRATION XIV

OPENING

Reception
(No Host)

5:45pm-7:30pm

Dine-Around

7:30pm-10:00pm

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BUILDING THE COLLABORATIVE BRIDGE

SATURDAY, APRIL 27, 2019

6:30am-7:30am

YOGA

All Levels



7:45am-8:45am

Continental Breakfast and Report from the CP Cal Board of Directors

Meet CP Cal's 2018-2019 Board of Directors! Join the BOD for breakfast as they report on the previous year's successes and plans for the coming year.

8:45am-12:00pm

Single Workshop (3 hours w/break)

#1 – Powerful Non-Defensive Communication: Cutting Edge Skills for Defusing Defensiveness, Often Instantly

All Levels

Sharon Strand Ellison

A single defensive response, whether subtle or overt, can derail a collaborative meeting. Participants will gain a detailed understanding of the dynamics of six defensive modes and crucial skills for how to defuse it, often instantly with no residue of adrenaline. Exercises will expose how often subtle forms of alienation and power struggle are inadvertently created and effective methods will be presented for dealing with it in one-to-one sessions and group meetings. Skills can be used immediately with wide applicability.

8:45am-10:15pm

Concurrent Workshops (1 1/2 hours)

#2 – It's Been 50 Years of No Fault Divorce In California. No Fault? Really? - Managing Client Expectations When They Are Not Acknowledge By California Law

All Levels

Jeff Jacobson, CFLS, Andrew Hunt, CPA, Jon Kramer, LCSW, Erin McGaughey, CFLS

2019 marks the 50th anniversary of no-fault divorce in California. With few exceptions, California law does not address themes of fault in adjudication of family law matters. However, fault is very present in interdisciplinary collaborative matters and serves to make our clients feel and act irrationally. Themes of fault impact client expectations as to both process and substantive outcomes. This workshop will explore strategies for collaborative teams to navigate these challenges, where client emotions and California law collide.

10:30am-12:00pm (continued)

Concurrent Workshops (1 1/2 hours)

#3 – Building Teamwork, Building Cases: How a "Study Group" Can Make All the Difference

All Levels

Cynthia Furze, Ph.D., Kathy Campbell, J.D., Gisette Denker, J.D., Pam Flournoy, CFP, CDFA, Beth Proudfoot, LMFT

Want more cases? Want to feel like you belong on a team that has truly gelled . . . but can't figure out how to break in? In this workshop, we'll discuss Study Groups, how to create them and how to use them to build teamwork, increase professionalism, and get more cases.

#4 – The Collaborative Case From Hell

All Levels/Advanced

Shawn Weber, J.D., CLS-F, Mark Hill, CFP, CDFA, Nancy Ross

Have you ever found yourself in a Collaborative Case that just went wrong in so many ways? We all have. Bring us the facts for your very toughest cases and join experienced Collaborators as we brainstorm different ways to handle the toughest situations. It's a fun, frank and facilitated discussion for sharing and learning from one another. Let's see if we can't handle the "case from hell!"

10:30am-12:00pm

Concurrent Workshops (1 1/2 hours)

#5 – Discovering Gaps in Client Processes and Using Technology to Improve Your Client's Experience

All Levels

Kerry Wallis, JD

Clients pay us for our knowledge and expertise, not for our administrative prowess. But we all can get overwhelmed with administrative responsibilities, which distract us from our advisory roles and ethical obligations. Whether you have a staff of 20 or you work solo, we will help you identify some of your barriers to providing exceptional service and demonstrate how to address them with current technology.

#6 – Co-Mediation: The Lawyer/Coach Team

All Levels

Constance Ahrons, Ph.D. & Woody Mosten, JD

This efficient dual profession model has as its hallmark that the lawyer/coach team together conduct the initial client meeting. Clients experience an integrated team with two professionals working together in their behalf from their respective training, knowledge, and skill set. After brief presentation of their model, the presenters will demonstrate a role-play to show how the presenters work together to form a synergistic interdisciplinary team. Discussion will follow addressing how this model can streamline and improve the quality of the mediation process.

Register Now!

www.conference.cpcal.com

CP CAL CELEBRATION XIV

SATURDAY, APRIL 27, 2019 continued

10:30am–12:00pm

Concurrent Workshops (1 1/2 hours)

#7 – Best Practices for Support Agreements

Considering Clients' Emotions

Intermediate/Advanced

Warren R. Sacks, CPA, CFF, Stephanie Maloney CFP, CDFA, James Walton, Ph.D.

Participants will gain insight and understanding regarding 'motivating a client to reach an agreement', or 'preventing clients from reaching an agreement' in spousal support. Through group participation and discussion, the presenters will identify the different ways to process financial information and provide financial tools and communication styles that work with these differences. Participants will also identify and work through their own biases that might interfere with agreement readiness.



12:00pm–1:30pm

Luncheon and Plenary I

Ellie Izzo, PhD, LPC with Vicki Carpel Miller BSN, MS, LMFT

Exploring & Expanding Emotional Intelligence: Enriching Clients and Professionals Along the Divorce Path Through the SeatBeat Experience

What would Collaboration look like if clients and professionals were able to enrich their emotional intelligence to better participate during and after the divorce experience? How would families fare if, in the moment of their distress, they had a tool that would immediately through its use change their brain and allow them to access more appropriate responses and insight into their thoughts, feelings and behaviors? This plenary will explore the Four Pillars of Emotional Intelligence, the corresponding neuroscience of the brain, and the innovative new tool Sentbeat The App, for use in Collaboration and life in general.



Ellie Izzo, PhD, LPC co-founder of and a core trainer with the Vicarious Trauma Institute and the Collaborative Divorce Institute. Ellie conducts various dimensions of counseling and coaching. She specializes in working with families in transition. She also serves as a Trainer, Communication Coach, Child Specialist, and/or Team Manager in the process of Collaborative Practice and Collaborative Divorce. Ellie is a member of the American Psychological Association, the American Counseling Association, the American Mental Health Counselors Association, International Academy of Collaborative Professionals, Association of Family and Conciliation Courts and Collaborative Divorce Professionals of Arizona. She is married with children and grandchildren. Her office is located in Scottsdale, Arizona.

1:45pm–5:00pm

Single Workshops (3 hours with break)

#8 – Exploring & Expanding Emotional Intelligence: Enriching Clients and Professionals Along the Divorce Path Through the SeatBeat Experience

All Levels

Ellie Izzo, PhD, LPC & Vicki Carpel Miller, BSN, MS, LMFT

What would Collaboration look like if clients and professionals were able to enrich their emotional intelligence to better participate during and after the divorce experience? How would families fare if, in the moment of their distress, they had a tool that would immediately through its use change their brain and allow them to access more appropriate responses and insight into their thoughts, feelings and behaviors?

#9 – Starting with the Big Rocks: Preparing Parties for Settlement by Identifying Common High Level Shared Values and Goals

Intermediate/Advanced

Shawn Weber, JD, CLS-F & Shawn Skillin, JD, Esq.

In life, there is a temptation to sacrifice over-arching principles and values for the minutia. To get as many rocks as possible into a container, one should start with the big rocks (basic principles) and then fill in with the smaller rocks (details and minutia). The same is true for negotiations. Starting with common principles and values sets the tone for the case. Learn how in this fun and interactive workshop.

Questions? Contact:

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BUILDING THE COLLABORATIVE BRIDGE

SATURDAY, APRIL 27, 2019 continued

1:45pm–3:15pm

Concurrent Workshops (1 1/2 hours)

#10 – Vetting the House in Elder/Divorce Collaborative Law: Preventing Legal and Financial Problems with Real Property Taxation, Valuation, Disposition, and Division

Intermediate

Prof. Kelly Murray, J.D.

Keeping the house just got harder after federal tax reform impacting divorce and mortgage in 2018 with even more drastic changes for family mediation starting in 2019.

This session reviews common pitfalls that can be prevented with more information about real property issues in family matters: trusts & estates, elder, and divorce. This session simplifies enhanced house due diligence (beyond appraisals) and leverages the discovery role of real estate-related professionals needed whether the house is kept or sold.

#11 – Divorce Mortgage Financing - 2nd Installment

Intermediate

Jason Crowley & Ross Garcia

Ross and Jason will provide a follow up to their 2018 presentation, in which they inform of:

- Key updates to lender guidelines
- Interest rates and forecasts
- Importance of timing in divorce financing
- Common roadblocks to successful financing

...and many other critical topics!

3:30pm–5:00pm

Concurrent Workshops (1 1/2 Hours)

#12 – Assessing Collaborative Suitability: Challenging Individual and Couple Characteristics

All Levels

Sharon Clark, Ph.D. & Cathy Daigle, CFP, CDFA

Assessments including interview questions and observations help us to understand a client's ability to Collaborate. This workshop is designed to provide interview questions and tools to identify challenging individual characteristics and couple dynamics. All professions will benefit, take away new perspectives and ideas, and engage in small and large group interactions. This brings opportunity to finetune our assessment and decision making regarding taking on cases given challenges in personality characteristics, coping or communication styles.

#13 – What Children Show About Divorce: Using the Sand Tray as a Child Specialist

All Levels/Beginner

Beth Proudfoot, LMFT

This presentation is for beginning Child Specialists and for practitioners of all disciplines who want a deeper understanding of what children experience, how they express their feelings, and how to translate their experience to words their parents can understand.

Dinner, Eureka Awards

Music and Dancing

6:00pm–11:30pm



Join us for dinner and come support your colleagues as they receive their Eureka Awards in CP Cal's 14th Annual Eureka Awards Ceremony, and then CELEBRATE with the CP Cal Community by dancing the night away to No Country for Old Men!

Register Now!

www.conference.cpcal.com

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Eureka Honorees

The Eureka Award recognizes and honors those who "have made significant contributions and demonstrated an abiding dedication to establishing and sustaining Collaborative Practice in California."

The Eureka Award is not limited to those in any particular practice or career. Previous honorees include members of the core disciplines—mental health, financial and legal—as well as those who are not licensed in these professions.

The Eureka Award was established in 2006 as part of the very first Celebration of Collaborative Practice in Sonoma, California, and actually pre-dates the founding of CP Cal. In its first two years, the Eureka Award Committee chose to play "catch up" and honored several recipients each year. In 2008, the CP Cal Board chose to limit the Eureka Award to three to five Honorees.

Past Recipients

2006 Honorabile Aviva Bobb Cathy Daigle Kim Davidson Mark Hill Jennifer Jackson David Kuroda Alan Nobler George Richardson Chip Rose Nancy Ross Pauline Tester Peggy Thompson Donna Beck Weaver	2007 cont... Mike Lowy Rod Nurse Steve Popell Jean Petrick Pete Roussos David Weinberg	2010 Suzan Barrie Aiken Karen Heller Berdy Judi Foley Amy Rodney Dawn Strachan	2013 Debra Bellings-Kee Ann Buscho Steven Garelick Brian Don Levy Lisa Schneider	2016 Mary Ann Aronsohn Melanie Belmont Keith Britany Melva Warriner Lisa Zonder
2007 Peg Anderson Hal Bartholomew Catherine Conner David Fink Paula Jackson	2008 Randy Cheek Shari DeLisle Liz Ferris Fred Glassman Kathleen O'Connor	2011 Mark Berke Carol Hughes Steve Rutlen Warren Sacks Len Weiler	2014 Jay Bray Susan Campbell Stephanie Maloney Joseph P. Spirito, Jr. Jude Sterling	2017 Kathleen Faulkner Diana Martinez Tracy McKenney Beth Proudfoot Lynn Verdone
2009 Natalie Leininger Lisa Murray Leslee Newman Emily Weaver	2012 Bart Carey Jane Euler Arlene Kostant John McDaniel Karen Russell	2015 Paul Brimberry Kevin Chroman Cathleen Collinsworth Thellen Levy Shawn Weber	2018 Sharon Clark Bruce Fredenburg Meredith Lewis Ria Severance Betsy Williams	

CP CAL CELEBRATION XIV

SUNDAY, APRIL 28, 2019

6:45am-7:45am

GROUP WALK

All Levels

Join us for a group walk around lovely Mission Bay, in San Diego. Level terrain, and paved paths, watch the early morning rowers, jet skiers and wildlife. A great way to start your day!



8:00am-9:30am

Breakfast and Plenary II

Powerful Non-Defensive Communication: Cutting Edge Skills for Defusing Defensiveness, Often Instantly Sharon Strand Ellison



Scientists have demonstrated that whenever people feel a need to protect themselves, others or even a belief, the complex problem solving cortex to “goes to sleep” and the amygdala flairs, fueling, “fight, flight or surrender” and loses the capacity to reason. Trying to talk a person out of being defensive is ineffective. However, scientists have also verified that if the person can shift out of defensive posture into any other “feeling” state, the physiologically defensive response can dissipate instantly. Unfortunately, both traditional adversarial communication and many of the newer alternative dispute resolution techniques are infused with verbal and non-verbal elements that prompt defensive responses. Participants will learn how to make key changes in how they ask questions, give feedback to others, provide information, and create boundaries when needed. These changes greatly enhance the ability to quickly defuse defensiveness and get to the heart of crucial issues and needs. Exercises and role plays will be used to raise consciousness, provide examples of the difference in impact, and give participants an opportunity to practice and enhance their ability to make the shifts.

Sharon Strand Ellison is an international consultant, award winning speaker, and the author of *Taking the War Out of Our Words*. Sharon has provided conference keynotes and training programs for Collaborative Family Law Groups across the US and Canada. In addition, she was an invited participant at the International Symposium on Human Dignity and humiliation at Columbia University, focused on the role of language in international conflict resolution.

9:30am-12:45am

Single Workshops (3 hours with break)

#14 – Agreement Readiness: How Full Interdisciplinary Teams Bring Clients to Agreement Readiness

Intermediate/Advanced

Carol Hughes, Ph.D., LMFT, Bart Carey, JD, Cathleen Collinsworth CDFA, BVAL

Even experienced practitioners often fail to understand how all professionals on an interdisciplinary team can assist clients, even high conflict clients, to become Agreement Ready. This training provides tools and techniques to fully prepare clients for developing their Key Elements of Agreement, Questions to Be Answered, Brainstorming and Evaluating Options and Co-creating Agreements. Learn how pioneering, successful interdisciplinary teams innovatively employ all three disciplines to shift clients toward agreement, simultaneously improving cost efficiency and facilitating better outcomes with more durable agreements.

#15 – Nesting For Happier Children: A New Approach to Preserving the Family and Putting Children First During Divorce

All Levels

Ann Buscho, Ph.D.

The new trend of “nesting” or “bird nesting” is a transitional, or temporary, arrangement where the children stay in the family home while the parents rotate on- and off-duty by agreement on a prearranged schedule. In addition to the schedule, a nesting plan will include agreements about the care of the house, finances, communication, parenting, and dating. Based on a forthcoming book, this workshop will cover assessment of readiness to nest, and offer tools for finances, parenting, and communication.

Questions? Contact:

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Building the Collaborative Bridge

SUNDAY, APRIL 28, 2019 continued

9:30am–11:00am

Concurrent Workshops 1 1/2 hours

#16 – The Caucus Genie: It Really is Magic!

All Levels

Shawn D. Skillin, Esq. & Shawn Weber, CLS-F

Caucus is one technique, which when utilized effectively, can move clients to a new perspective by assisting them to see the needs and interests of the other party. An effective caucus builds trust and at the same time causes the client to question their own perspective and consider alternatives. A series of thoughtful questions will assist the client in stretching their thinking to include the perspective of the other party, likely or unlikely outcomes and the consequences of reaching or not reaching an agreement. Learning to use these skills effectively can work magic! This is a participatory workshop, multi-media workshop.

#17 – Who Wants the House? Quelling Family Drama in Probate/Post-Mortem Trust & Estates Matters

Beginning/Intermediate

R. Kamela Laird, Esq., Marcus Hinds, Cinda Jones, CFP, CDFP, Lynn Waldman, LCSW

How to manage family relationships (read: dysfunction) in a probate matter and specifically address the issue of the family home, since much conflict typically revolves around it. Most probate matters deal with whether to sell the family home, rent it out, or allow family members to live there rent free after Mom or Dad has died. Think emotional attachment to the family home AND it's the biggest asset in the estate. Learn how to increase the likelihood of family harmony.

11:15-12:45pm

Concurrent Workshop (1 1/2 hours)

Creative Storytelling: Enlisting, Engaging and Enrolling Clients in the Collaborative Process

All Levels

Nancy J. Ross, LCSW, BCD, Cathy Daigle, CFP, CDFP, Alan Nobler, JD

Collaborative Practitioners, both beginning and experienced, face the challenge of explaining Collaborative Practice without seeming to 'sell it'. This workshop explores an alternative to our usual practice of trying to describe what we do and instead helps practitioners create their own 'story' in a one-page handout to clients. Whether Divorce or Trusts and Estates, practitioners will walk away with a tangible tool that will engage even the most resistant clients.

HOTEL INFORMATION

Hilton San Diego Resort and Spa

1775 East Mission Bay Drive

San Diego, California 92109

1-619-276-4010

The Hilton San Diego Resort and Spa has provided a limited number of rooms for our group at the discounted rate of \$194 per night. Visit the Conference Website for more information.

This state-of-the-art San Diego hotel is located just 6 miles from San Diego Int'l-Lindbergh Field Airport. The Hilton San Diego Resort and Spa is nestled along the shores of Mission Bay. The distinctive property combines bay views, natural beauty and abundant amenities in one scenic location.

www.conference.cpcal.com

Limited number of rooms available on a first come, first served basis. ROOM BLOCK ENDS APRIL 12.

FINANCIAL ASSISTANCE

We know that in this economic climate, some of you may not be able financially to participate in Celebration XIV. The good news is the CP Cal Board has approved \$5,500 in Scholarships to be applied towards registration fees for Conference XIII on a first-come, first-served basis, as follows:

First-time Attendee: \$2,500 available (\$100 per individual for 25 first-timers). Be sure to check the box on the Registration Form.

Needs-based: \$3,000 available, to be allocated by the Scholarship Committee on a confidential basis.

For more details, contact:

Christine Maderos at 925-566-8590, christine@cpcal.com

CONTINUING EDUCATION

Applications for legal and mental health credits are pending.



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Register Now!

www.conference.cpcal.com